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AUTHOR	Garner, Imogen
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ABSTRACT

This paper describes the experiences of a recent change process that focused on the delivery of reference services at the University of Western Australia (UWA). UWA reference librarians felt that they could not fulfill all of their duties while working from the reference desk for a significant period of time each day; they wanted time away from the desk to undertake other duties, including to prepare and deliver information literacy classes and to develop and maintain electronic resources for the library's World Wide Web site. The project followed a four-stage approach that included: (1) developing a plan of action; (2) acting to implement the plan; (3) observing the effects of the action; and (4) reflecting on these effects as a basis for further planning. The changes in the delivery of reference services had far-reaching consequences for the provision of client services and led to the development of a three-tiered level of service that included self help, inquiry, and reference services. (MES)

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NEW REFERENCE: DIVERSIFYING SERVICE DELIVERY

Garner, Imogen
The University of Western Australia, Perth, Australia

E-mail: Igarner@library.uwa.edu.au

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Introduction

A new strategic direction for an organisation involves a process of planned change. The reference librarians at The University of Western Australia (UWA) have recently emerged from such a change process that focused on the delivery of reference services. This paper aims to describe the experience.

Over a period of five years the reference librarians had become increasingly involved in delivering a diverse mix of services and resources. Their role had increased in complexity and it placed pressure on them to maintain traditional reference desk services while accommodating new activities such as web authoring and delivering information literacy programs.

They had been considering the future of reference services for some time. The reference librarians had engaged themselves in activities such as writing a discussion paper on the "Future of reference services", attending seminars run by Anne Lipow on "Rethinking reference" and Arnold Hirshon on "reengineering reference", and holding their own workshop on redesigning their reference operation. They recognised the need for change and established what they wanted to do but then found it difficult to actually take the first steps to implement their plan. Time passed and resistance to the change grew and doubts about their future direction emerged.

Resistance to change is a common response even when the change is self-initiated. Individuals often feel insecure or anxious, leading to resistance or inertia. In part this explains why the reference librarians had difficulty taking action to change their role. Leadership is also an important aspect of effective change management. The reference librarians had progressed as far as they could without external direction. It was therefore decided to facilitate the reference librarians through the change process.

Reviewing the Literature

The literature on rethinking reference services identified from LISA at the time illustrated that the concept was not new. Since the 1980s the cost-effectiveness of reference services in university libraries had been questioned and in particular the inherently inefficient service delivery method centring on the reference desk. Using technology to automate reference questions was seen as one approach to becoming more efficient. (1) Other studies recognised that many questions answered at reference desks required low-level responses. (2) By the early 1990s articles appeared reporting the demise of the reference desk. For example "The Main Library at Brandeis University eliminated its reference desk in 1990. (3) and the development of differentiated reference services started to occur in some libraries. (4) Overall studies recognised the high cost of the traditional desk based model, the lack of control over the work to be performed and the inflexibility of the service. However these developments were mainly being reported from academic libraries based in North America.

Background

The UWA reference service comprises staff situated in nine subject libraries distributed across the campus.

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Each subject library has from one to three reference staff. The reference librarians report to a librarian who manages each subject library. The reference librarians also meet as a cross sectional team to discuss reference related issues. The problem that faced the reference librarians was that they felt they could not fulfill all their duties while working from the reference desk in their subject library for a significant period of time each day. In subject libraries with only one reference librarian they could spend all day working on the reference desk. They wanted time away from the desk to undertake other duties. These included time to prepare and deliver information literacy classes and to develop and maintain electronic resources for the Library's web site *CygNET Online*. They also wanted to respond to indepth reference questions in a profesional manner away from the public desk where the demand for answers to directional and basic information questions and telephone queries were a continual interruption.

Reference seminar series

In order for them to address the problem, a series of seminars were arranged by an external facilitator. A total of four sessions were held, however planning the changes was difficult and progress was slow. The seminars became sidetracked at times and in the end failed to identify actions that would make significant changes in reference services. The activities designed to re-position reference services stopped short of actually making changes to the traditional delivery of reference services from the desk.

The reference staff had been encouraged to consider alternative service delivery models for themselves but they had not been directed to make changes. In retrospect the awareness raising activities took too long. Also it may have been unrealistic to expect that the staff involved in the delivery of traditional reference services could make the decision to change. It was therefore at this point that senior staff intervened to advance the discussion into action.

The Project

The aim of the project was to address the concerns that the reference desk model of service delivery was no longer the most efficient and effective method of meeting client needs. The methodology was based on action research that has been applied in many contexts to enable staff involved in a change process to decide on the course of action that leads both to improvement and to evaluation of the results.

The action research model was originally used by Kurt Lewin in the 1940s as a strategy for change, and his work has been cited frequently in the action research literature by authors such as Clark (5), Kemmis/McTaggart (6), Zuber-Skerritt (7) and Stringer (8). The process involves a series of spiral steps composed of planning, action, observation and reflection. While there are many variations on the action research model all involve a similar set of stages. The *Action Research Planner* (6) outlines the four stages of the process as follows:

- develop a plan of action to improve what is happening
- act to implement the plan
- observe the effects of the action
- reflect on these effects as a basis for further planning.

The project followed this general approach.

Developing the Plan

The objective was to enable reference staff to respond to changing client demand for reference services in the electronic environment.

Information gathered before and during the planning phase indicated that only 22% of questions addressed to reference staff required a professional librarian's expertise. The majority of questions asked both in person and on the phone were either directional or basic inquiry questions. This statistical information is

widely supported in the library literature and certainly is not unique to UWA Library. It suggested that answering reference questions could be managed differently. Subject libraries were designed with two desks – a loans desk and a reference desk. Clients often didn't understand the difference between these two service points. It was decided to amalgamate the reference desk and the loans desk to form one service point that would act as an initial inquiry point for all clients. The Loans staff would staff the inquiry desk, releasing the reference librarian from the reference desk to work from a reference office. However this would create changes not just in the delivery of reference services but also for loan services and the staff involved. The question was how to provide additional resources to support the inquiry desk staff?

The planning process considered people factors such as the changing role of the loans staff who would find themselves faced with a very different role working on an inquiry desk rather than a loans desk. Also the reference staff would need to consider how to deliver reference services without a desk. And what of the clients - would they notice a change in service?

The change to an inquiry desk model of service required the support of all staff involved in the process and so it was decided to trial the model in one subject library on a temporary basis in 1997. Trialing the inquiry desk model in one subject library kept the number of library staff involved in the initial changes quite small. Staff involved in the trial kept a record of the changes and their effects – both positive and negative. They also identified their resource requirements. For example an Inquiry Desk Help File was compiled by the reference librarian to assist with frequently asked questions. Guides were developed to assist clients access electronic resources directly on *CygNET Online* to reduce the number of questions at the inquiry desk on how to locate the electronic databases. A training program was devised for the library officers on questioning techniques, and a PC replaced the terminal on the inquiry desk to provide direct access to *CygNET Online* for inquiry staff. The training program was not designed to turn loans staff into reference librarians. The role of the library officers was to enhance the services they provided by having the skills and experience to know what questions they could answer and what to refer to the reference staff. The reference librarian was available to provide a personal reference service to clients in an office environment although still visible to the inquiry desk staff and clients via a glass wall. The emphasis was on team work. The library officers and the reference librarian worked towards the same goal of providing services to support academic staff and students with their research and learning.

Action – The trial

The first trial was monitored and it was immediately apparent that workload had transferred from the reference librarian to the library officers.

Observation indicated that changes were required. The library officers discussed their concerns openly and operational decisions were reached through consensus. The staff developed a strong interest in the success of the project through this involvement.

Reflection confirmed that library staff were on the right track with the overall changes they were making but the workload problems required action.

The revised Plan

Therefore a second cycle of activities was planned. The new approach introduced an additional strategy – self service. Self service was to be used to deliver services that could be managed by the clients themselves. Initially this involved the introduction of a self checking machine for general loans. Help Desk files were developed to assist clients at the workstations, signage was improved and an open reserve was planned.

At this point a significant and symbolic action marked the ongoing commitment to the changes. The reference desk was physically removed from the Library. The reference librarian moved permanently into

an office and the inquiry desk became the single service point.

By the beginning of 1998 the trial was over and the new reference service was operational in the first subject library. The changes included one service point, a self check loan machine, open reserve, better signage and guides and most significantly a change in the way both library officers and reference staff worked together as a team to deliver client services.

The staff recorded the impact of the changes in service. Among expected changes they identified were:

- Improved services for clients where many queries were resolved at the first point of inquiry;
- Increased confidence by library officers in their ability to answer more advanced questions
- Reference librarian freed from the tyranny of the Desk
- More interesting work for both library officers and reference staff
- Reference staff able to spend more uninterrupted time with clients in need of advanced reference assistance, web authoring and delivering classes.

Unexpected changes included:

- Library officers felt more confident in referring clients to the reference staff when appropriate because they had a better understanding of the sorts of questions they were able to answer
- They had options in attending to clients' needs either directly, through referral to the reference librarian or by having an appointment book to offer advanced bookings for students with the reference librarian
- The networked PC installed on the inquiry desk provided direct access to *CygNET Online* where previously the Loans staff worked with terminals and referred even straightforward queries to the reference desk because they lacked access to the network.

Based on the success of the trial which took place in the Education, Fine Arts & Architecture Library (EDFAA), two additional subject libraries joined the program to discard their reference desk in 1998 – the Law Library and the Maths and Physical Sciences Library. In 1999 two more libraries have followed – the Business Library and the Biological Sciences Library. To date there has not been one complaint from clients regarding the disappearance of the reference desk!

Tiered levels of service
The changes in the delivery of reference services had far reaching consequences for the provision of client services and led to the development of a three tiered level of service – self help, inquiry and reference services.

Self Service
Self service has increased and now includes a publication program of information booklets and guides, plans for an improved signage program developed by professional sign planners, electronic delivery of information literacy programs through the Library's InfoPathways information literacy program, development of electronic exam papers, self check machines in more libraries, open reserves in more libraries, self help loan services such as placing recalls on materials directly on the system.

Inquiry Services
The inquiry level service includes a series of electronic forms on *CygNET Online* to enable clients to request document delivery services, request store materials and an "Ask a reference librarian" service. A Telephone Inquiry Service (TIS) has been introduced in response to the number of general queries received at both reference and inquiry service points. This service has proved to be an outstanding success in its aim of reducing the number of calls that were dealt with previously at the desks. It has had other very positive

outcomes that could be the topic of another paper.

Reference Services
The reference staff, working in an office environment, report that they now can offer innovative and flexible services to meet the changing demands of library clients.

Conclusion
The changes made to accommodate the needs of the reference librarians led to widespread changes in client service. Staff came to recognize that self service activities are a legitimate method of effecively and efficiently delivering library services. The introduction of inquiry desks and a telephone inquiry service have changed the role of the library officers from 'loans' staff to staff with a direct role in delivering information services to clients. They report enthusiastically about the more interesting work they can do now that loans have become a self service activity. The reference staff achieved their goal, eventually, of providing a range of professional services in an appropriate environment.

By the end of 1999 the aim is to have implemented an inquiry service in all but one of the subject libraries at UWA.

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Biographical Details
Imogen Garner is the Associate Librarian, Client Services at The University of Western Australia, Perth, Australia. (1990+)

She holds Bachelor of Arts and Bachelor of Education degrees, a Masters Degree in Education and a Graduate Diploma in Management from The University of Western Australia. She is an Associate of ALIA.

Imogen is currently the General Councillor for Western Australia on the Australian Library and Information Association (ALIA) General Council and she is also a member of the ALIA Board of Education.

Correspondence should be addressed to:
Ms Imogen Garner
Associate Librarian, Client Services
The University of Western Australia Library
NEDLANDS Western Australia 6907

e-mail address: igarner@library.uwa.edu.au

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